

MEWA Annual Report/Renewal Checklist

MEWA Name: _____

Contact Person: _____

Contact Email: _____ Phone: _____

Contact Address: _____

Requirements

(Please number or tab each item accordingly)

	1. Application
	2. Annual Fee State along with \$50 Annual Filing Fee and \$100 Internal Audit Fee
	3. Audited financial statement
	4. Management Discussion and Analysis
	5. Actuarial Opinion including the level of aggregate stop-loss insurance the MEWA maintains
	6. Examination Report if applicable
	7. Names and addresses of all participating employers
	9. Number of covered individuals
	10. Renewal certificate of insurance Fidelity Bond (If coverage changes, see below)

Have the following items been modified or changed since last renewal?		
Yes	No	If response is yes, please attach appropriate document(s).
		11. Current fidelity bond if change has been made since last renewal.
		12. Provide either: (a) the current schedule of the Trust's stop-loss agreement; or (b) the stop-loss agreement with the new carrier (if applicable). <i>Note: If the Trust does not have a copy of the revised schedule at the time of the MEWA filing, please provide confirmation of the terms of the stop-loss agreement and promptly file the schedule upon receipt by the carrier.</i>
		13. Trust Agreements with Compliance Checklist
		14. Bylaws
		15. Plan documents along with a certification from the trustees they are in compliance with the minimum requirements of Rule 760 IAC 1-68.
		16. Biographical affidavits must be submitted for each newly elected officer, director or partner of the applicant. These must be originally signed and notarized.

Please list the current Officers of the Trust:	
President:	
Vice President:	
Secretary:	
Treasurer:	
Please list the current outside vendors providing services to the Trust:	
Accountant:	
Actuary:	
Attorney:	
Claims Administrator:	
Consultant:	
Financial Advisor:	
Stop-Loss Carrier:	
Wellness Provider:	
Other:	
Other:	
Other:	